United States
Department of Agriculture
Foreign Agricultural Service
May 1986

Foreign Agriculture

New Soviet Farm Policy Targets Greater Efficiency

Marketing News

USDA To Sponsor Transportation Conference

The U.S. Department of Agriculture will hold an agricultural transportation conference in St. Louis, Mo., on May 13-15. The conference will focus on expanding world markets for U.S. agricultural products by promoting improvements in the domestic transportation system. Conference workshops will include updates on the effects of rail and truck deregulation, highway costs, U.S. waterway issues, options to deal with the growing crisis of America's rural roads and bridges and export perspectives for 1986 and beyond.

"Any successes achieved for the domestic side that help improve the efficiency of the U.S. transportation system can help us sell more products to world markets," said Martin F. Fitzpatrick, administrator of USDA's **Office of Transportation.**

For further information contact Ronald P. Vail, Office of Transportation, Room 1405, Auditor's Bldg., Washington, D.C. 20250. Tel. (202) 447-6793.

Holstein Association Redirects Its Export Efforts

Beginning this year, the **Holstein-Friesian Association of America** will redirect its traditional international commitment to marketing U.S. Holstein genetics by placing major emphasis on both the transfer of dairy management expertise and the expansion of consultant marketing services to foreign buyers. While the Holstein Association will continue to operate in a cooperative role with U.S exporters, its focus has shifted toward technical programs and marketing services.

Holstein-Friesian Services, Inc. (HFS), a commercial subsidiary of the Holstein Association, was formed nearly 20 years ago to pioneer the marketing of U.S. Holstein genetics to the world, at a time when such services were limited. But today, the market has evolved and many private companies are now capable of exporting dairy genetics. At the same time, there has been a growing demand for the technical support services of the Association to assist buyers with their purchases. HFS technical programs and marketing services will now be administered by the Holstein Association.

Trade Policy Council Unites Meat Industry Association

Five major agricultural trade associations—**the U.S. Meat Export Federation, the American Meat Institute, the American Farm Bureau Federation, the National Cattlemen's Association and the National Pork Producers Council**—have joined forces to establish the Meat Industry Trade Policy Council. This Council will establish future U.S. trade policy priorities and develop strategies for removing tariff and non-tariff barriers to U.S. red meat exports.

The Council's objective is to develop an industry consensus on trade issues, as well as an action plan for achieving its goals. At the first meeting, the Council discussed U.S. meat trade with the European Community, including recent moves to ban the use of synthetic hormones, the U.S.-Japanese beef trade agreement, trade with South Korea and the U.S. Department of Agriculture's Export Enhancement Program.

FAS Establishes Agreement With Jersey Cattle Club

The **Foreign Agricultural Service** recently signed a cooperative agreement with the **American Jersey Cattle Club** to work together in the development and expansion of overseas markets for Jersey cattle over the next five years. Under the cooperator agreement, the Club will focus on foreign importers and registers of Jersey cattle. Market expansion will be particularly targeted toward Latin America and the Pacific Rim.

The Jersey Cattle Club—currently the second largest U.S. dairy cattle breed registry association—was established in 1868 as a non-profit organization. It has expanded to a membership of 2,600, registering over 60,000 Jersey cattle annually. The Club, which was a cooperator with FAS over 30 years ago, has again expanded its marketing role due to an increase in the number of Jersey cattle in the United States.

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Managing Editor
David Garten
(202) 447-2375

Design Director
Vincent Hughes

Writers
Lynn K. Goldsborough
Edwin N. Moffett
Maureen Quinn
Aubrey C. Robinson
Geraldine Schumacher
Jennifer M. Smith

Associate Designer
Sylvia Duerkson

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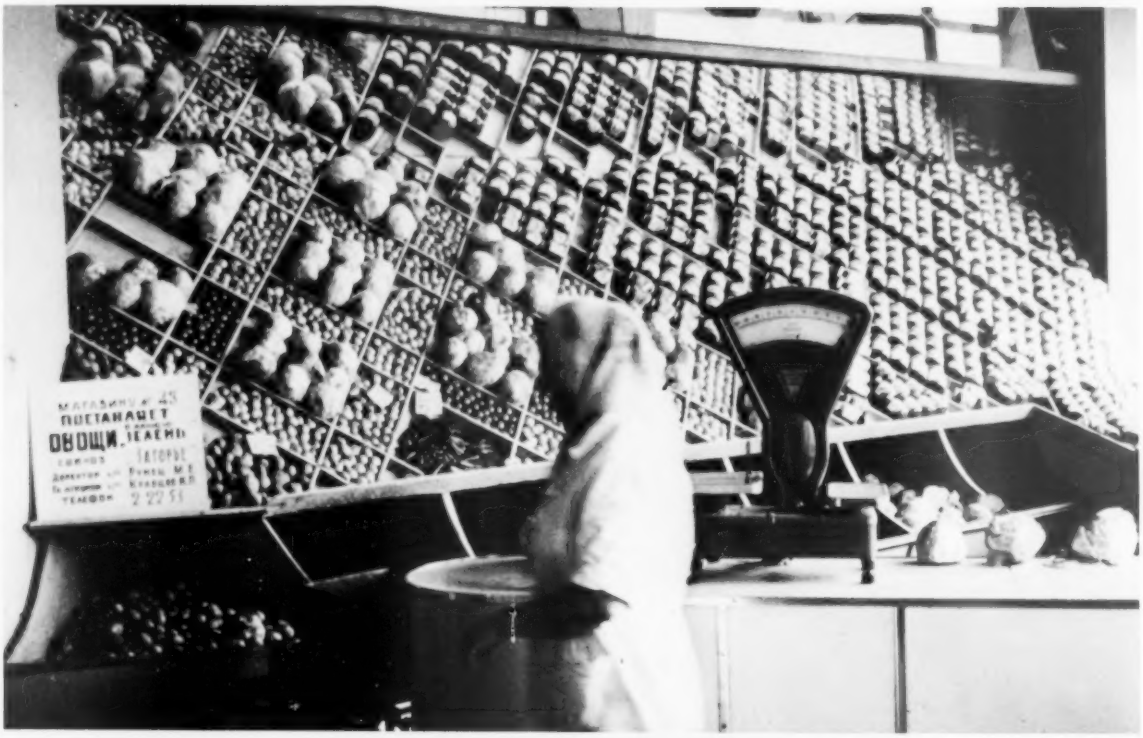


By Keith Severin

Although the Soviet Union is a complicated, restricted market, it is the second largest one for U.S. agricultural products, taking $2.5 billion worth last year. Any change in Soviet agricultural policy is big news for U.S. exporters.

In recent months, Soviet agriculture and the agencies that support it have undergone major modifications. This month, FOREIGN AGRICULTURE looks at these changes and what they could mean for Soviet production as well as import needs.

Down through the years, Soviet leaders from Josef Stalin to Leonid Brezhnev have devised various programs and organizations to solve the problems of the USSR's huge agricultural sector. Mikhail Gorbachev is no exception. In November 1985, he announced plans for the reorganization of Soviet agriculture.

The new organization responsible for the entire Soviet food chain is the State Agro-Industrial Committee, commonly known as GOSAGROPROM.

New System Has Roots in Brezhnev's Food Program

GOSAGROPROM has its roots in Leonid Brezhnev's 1982 Food Program, developed to improve the supply of food to Soviet consumers. The Food Program was formulated primarily by Gorbachev—Brezhnev's chief agricultural policymaker from 1978 to November 1982, when Brezhnev died.

Now that he has assumed leadership of the country, Gorbachev has begun to restructure and streamline agriculture on a broader scale.

Briefly, GOSAGROPROM encompasses functions previously held by the recently abolished ministries of agriculture, fruit and vegetable production, rural construction, meat and dairy industry, and food industry, as well as the State Committee for the Technological Servicing of Agriculture.

Under Brezhnev's Food Program, these agencies were separate, autonomous entities. Their functions contributed to the work of the Commission of the Agro-Industrial Complex, formed by the USSR Council of Ministers to improve the management of agriculture and other sectors in the agro-industrial complex.

Under Gorbachev, these agencies have been brought together into a single organization that accounts for over 30 percent of the "gross social product" of the country.

GOSAGROPROM Includes Other Agencies

In addition to these six agencies, GOSAGROPROM also includes Tractor and Agriculture Machine Building, Machine Building for Animal Husbandry and Fodder Production, Machine Building for Light and Food Industry and Household Appliances, Chemical Fertilizer Production, and Medical and Microbiological Industry.

For planning and finance, GOSAGROPROM incorporated some functions of the Ministry of Grain Products (formerly the Ministry of Procurement), the Ministry of Land Reclamation and Water Resources, the Ministry of Fish Industry, the State Committee for Forestry and the Central Union of Consumer Cooperatives.

By combining these functions into one organization, the Soviets hope to reduce duplication of responsibilities and to eliminate the bureaucratic impediments resulting from the greatly splintered agricultural sector.

GOSAGROPROM[1]

Encompasses all the functions of the former:

- ★ Ministry of Agriculture
- ★ Ministry of Fruit and Vegetable Production
- ★ Ministry of Rural Construction
- ★ Ministry of Meat and Dairy Industry
- ★ Ministry of the Food Industry
- ★ State Committee for Production and Technical Servicing of Agriculture

Plus parts of:

- ★ Ministry of Light Industry
- ★ Ministry of Land Reclamation and Water Resources
- ★ Ministry of Procurement

[1]*State Agro-Industrial Committee*

Gorbachev Sets Tone for Agriculture

In his five-hour address to the 27th Party Congress in Moscow on February 25, Mikhail Gorbachev said that the twelfth five-year plan, which is now beginning, is a turning point for the Soviet agro-industrial sector.

"Scientific-technological progress" and "improved productivity" were key phrases he used, saying that by the year 2000, the shortages of agricultural produce and consumer goods will be eliminated.

Referring to 1985, he said the 17 million hectares of grain grown under intensive technology produced an additional 16 million tons of grain. (The 1986 plan calls for 31 million hectares of intensively grown grain.) As for the preceding four years, no information on the size of the grain crop was given.

Referring back to the days of Lenin's New Economic Policy in 1921, and reinforcing decisions made in 1982, Gorbachev said farms, after meeting sales obligations to the state, could market excess production to collective farm markets or cooperatives. These outlets deal directly with the consumer. Market forces in these outlets are more nearly like those in the West.

Goal Is To Streamline Management

According to GOSAGROPROM's chairman Vsevolod Murakhovsky, the restructuring is designed to:

—replace outdated and cumbersome economic management;
—increase production; and
—bring the administration and operation of agriculture and its related industries into "a single whole."

Progress already has been made in meeting these goals. An example of administrative streamlining can be found in the largest republic in the Soviet Union, the Russian Socialist Federated Soviet Republic.

Previously, there were 258 subdivisions of seven ministries and committees in this republic. Under GOSAGROPROM, there are only 25 subdivisions. The staff has been slashed by 35 percent and the wage fund was cut by 20 percent.

Administrative streamlining will give farm managers more independence and opportunity for taking initiatives. This should improve labor productivity and save on other inputs.

Agricultural specialists in the Soviet Union calculate that with the recombination of resources alone—without additional expenditures—the new agro-industrial complex can increase production by 20 to 30 percent.

Restructuring Was Overdue

Soviet officials and agricultural specialists agree that restructuring of the agricultural sector was long overdue. Farm output falls far short of the investment made in agriculture.

Agricultural production contributes 14-15 percent to the gross national product but accounts for about 25 percent of total investment.

The value of agricultural output did not increase at all in 1985, according to the plan fulfillment report released in late January. According to TASS, the official Soviet news agency, implementation of Brezhnev's Food Program has been unsatisfactory in terms of meeting its major goals, particularly those for grain and meat.

During 1981-85, milk products, refined sugar and several less important items surpassed production targets, according to TASS. The output of meat, milk, eggs, fruit and vegetables increased but, in general, production targets were not met.

Production To Increase

For the new five-year plan period (1986-90), gross agricultural output is targeted to increase by 14-16 percent over that of the last five-year plan. The 1986 plan calls for a 4.4-percent increase over 1985.

However, there is some doubt whether that goal will be achieved because of problems in supplying farms with needed seed, fertilizer and other inputs. Farmers have been told they should be prepared to rely mainly on existing resources. (GOSAGROPROM is the sole holder of stocks of materials for the entire agro-industrial complex.)

Increased Emphasis on Science

GOSAGROPROM is putting considerable emphasis on science and technology to achieve its goals, especially those relating to intensive production techniques.

Agricultural losses are a significant drain on the agro-industrial sector. Roughly 20-25 percent of farm output is lost between the point of production and the consumer. Inadequate transportation, processing and storage facilities are largely to blame.

A History of Soviet Agricultural Plans

GOSAGROPROM is the latest agricultural effort by the Soviet General Secretary. Earlier efforts have included:

—Josef Stalin's collectivization of the countryside and the formation of machine tractor stations. Stalin used agriculture to underwrite the industrialization of the country.

—Nikita Khrushchev's Virgin Lands Program in the mid-1950s, which was designed to expand grain output and livestock production to the extent that the United States would "be buried in milk, meat and butter."

—Leonid Brezhnev's Food Program, announced in May 1982, which attempted to improve Soviet food supplies by increasing farm output and reducing losses through the construction of badly needed infrastructure.

Reducing losses of produce between the farm gate and the consumer, as well as improving product quality, are the main goals of GOSAGROPROM during 1986-90 and to the year 2000.

Under the new plan, food availability to consumers could be increased because improved transportation, storage and processing could cut losses by at least 50 percent.

A Possible Change in Import Needs

Improved output of livestock products continues as one of the major goals of the new plan. To raise meat production to 21 million tons (slaughter weight) by 1990 (up from 17.1 million in 1985), more protein will be needed in feed rations.

The recent resumption of purchases of U.S. soybeans could be a sign of how GOSAGROPROM plans to fulfill this livestock target.

Grains and oilseeds likely will need to be imported because the probability of producing 250-255 million tons of grain by 1990 and 7.4-7.5 million tons of sunflowerseed by then appears small when compared with recent output levels.

USDA estimates that Soviet grain production averaged 180 million tons during 1981-85. Output of sunflowerseed, the primary source of edible oil in the USSR, averaged 5.0 million tons during that same period.

Effectiveness Remains To Be Proven

While General Secretary Gorbachev, by virtue of his training and background, is better equipped than his predecessors to deal with the food and agricultural problem of the USSR, time will tell how durable the problem is and where possible solutions lie.

According to one Soviet official commenting on GOSAGROPROM, "The centerplace of the agro-industrial complex should be the shelves of food stores." ■

The author is with the Foreign Production Estimates Division, FAS. Tel. (202) 382-9880.

India's Farm Trade Reflects Government's Guidance

By W. Garth Thorburn

During the past five years, India has been moving in the direction of import liberalization but, so far, imports of technology have benefited the most. Although current policies have curbed imports of products such as fresh and processed fruits and vegetables, tobacco, wines, beer and other alcoholic beverages, export opportunities still exist for certain other U.S. agricultural products.

Here is a brief look at the market potential for selected U.S. commodities.

Large Market Opens for Dry Peas

Pulses are a major source of protein in the Indian diet. Pulse production in India, however, has remained stagnant during the past several years, and with continuing growth in population, the gap between supply and demand has widened significantly.

Most major agricultural imports are handled by the government or by institutions set up by the government. However, to supplement domestic supplies of pulses, India now permits imports by private traders under open general licensing. This has opened up a large market for U.S. pulses. Last year India became the largest buyer of U.S. dry peas, importing more than 30,000 tons.

Lack of product awareness and competition with alternate suppliers such as Turkey, Thailand, Burma, Canada and New Zealand are the major constraints in increasing exports of U.S. dry peas. For lentils, higher U.S. prices are a limiting factor.

In order to expand the market for U.S. pulses in India, the USA Dry Pea and Lentil Council has initiated a number of projects. Activities include sponsorship of Indian trade team visits to the United States, cooking demonstrations and participation in food shows.

Soybean Oil Faces Competition

India is the largest world market for soybean oil, accounting for an average 15 percent of total world imports between 1981 and 1985. It also is one of the largest importers of rapeseed oil and palm oil and products.

Since domestic oilseed production is unlikely to match growing demand, India will remain a large importer of vegetable oils. However, India tries to buy the cheapest oils available on the world market in order to get the most volume for its money.

As a result, cheaper soybean oil from Brazil and lower priced palm oil and products from Malaysia are cutting into the Indian market for U.S. soybean oil.

If the United States is to return to its former position as the prime supplier of soybean oil to India, its products must be competitively priced. Continued emphasis on market research and follow-up promotional activities also could improve U.S. sales prospects.

Marketing Programs Underway

Soybean oil has not received consumer acceptance as easily as other oils because of taste preferences and problems in refining crude soybean oil.

To increase demand for soybean products, both for human consumption and as animal feed, the American Soybean Association is working closely with soybean oil refineries in India to improve technology.

Several programs are underway to develop other uses for soybeans such as tofu, soymilk and baby foods. Researchers also are trying to come up with a way of substituting soybeans for pulses in the popular Indian dish dal.

The Indian government is allowing some blending of soybean oil with peanut oil, which should generate higher demand for soybean oil.

Push Needed To Popularize Wheat

Indians living in south and eastern India generally prefer rice as a diet staple. In order to increase wheat consumption, U.S. Wheat Associates is introducing marketing programs to popularize wheat in the traditional rice consuming states. Because of the high cost of rice and its lower protein content compared to wheat, the Indian government is supporting these efforts.

Activities focus on improving the quality of wheat products by providing training and technical support to milling and baking technicians.

U.S. Wheat Associates recently sponsored a group of Indian millers at a special class in flour mill management and quality control at Kansas State University.

Indian millers have acquired authority to purchase wheat directly from the open market. Reacting to the possibility of increased profit margins, millers are seeking higher quality wheat, which could stimulate demand for U.S. wheat.

Livestock and Poultry Germplasm Outlook Improves

Although India has the largest livestock population in the world, its production of milk, meat and wool is relatively small because of the lack of sufficient feed and fodder.

In the past few years, feed and fodder management programs, as well as efforts to improve animal breeding and health care, have boosted production. This emphasis has expanded the market potential for high-quality U.S. sheep and poultry breeding stock, and frozen cattle semen and embryos.

Poultry and egg production is expanding rapidly in India, and poultry profits are healthy due to shifts to less costly feed ingredients, more feed-efficient birds and higher egg production from new strains of hybrid layers.

Approved hatcheries are permitted to import pureline stock, which is boosting the market potential for U.S. poultry breeding stock. Favorable terms similar to those offered by European suppliers can help expand U.S. exports of poultry germplasm.

Breeding Farms Rely on U.S. Technology

Lamb, sheep and goats are the major meat sources in India. Goats alone account for over half of India's total meat production. Although few Indians eat beef because of religious beliefs, dairy herds are maintained to supply fresh milk and other dairy products.

Now that the government has set up breeding farms for well-known breeds such as Holstein and Jersey, imports of livestock are limited. India, however, remains a good potential market for cattle semen in order to produce crossbreeds to improve productivity.

The Indian government also continues to import Rambouillet sheep for crossbreeding.

Demand for Milk Products Could Climb

India does not permit the import of milk on a commercial basis since the country is almost self-sufficient in milk production. Commercial imports of milk powder, butter and butter oil were stopped in the mid-1970s. Since then, most imports have been donations from the World Food Program, the European Community and the United States under the P.L. 480 Food for Peace Program.

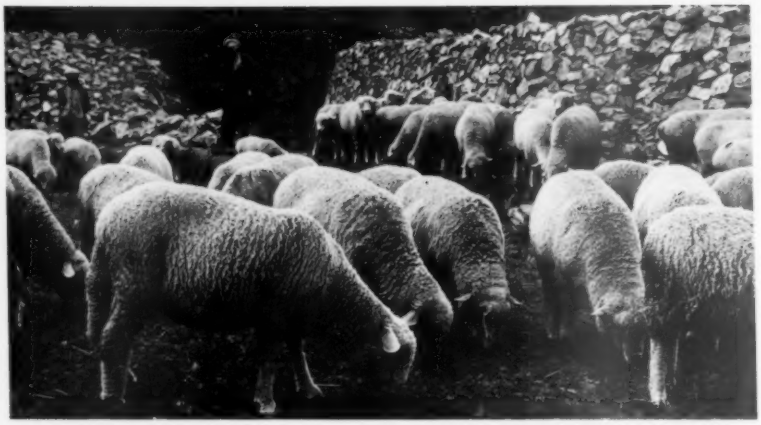
Even though India produces most of the milk it needs, improvements in the standard of living will stimulate higher demand for milk and milk products in the future. Therefore, India may resume importing milk powder on a commercial basis.

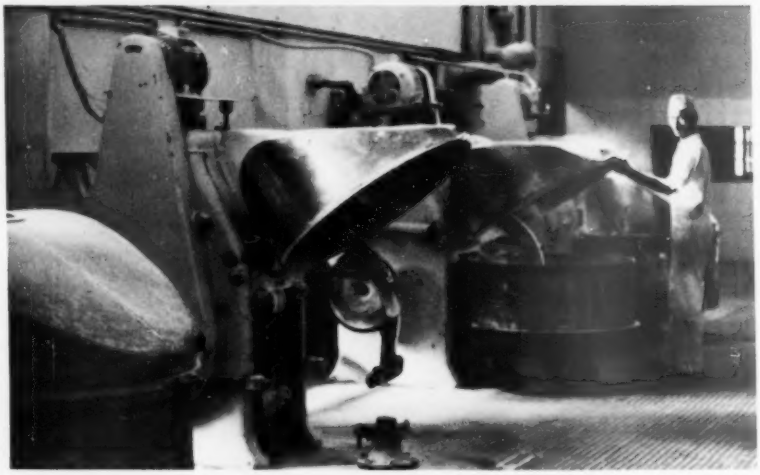
At present, manufacturers and exporters of biscuits, cakes and other confectionery items are permitted to import milk powder on a limited basis at 9-10 percent of the overall value of exported Indian sweets.

If confectionery manufacturers and exporters are able to increase exports, the demand for high-quality milk powder used in these items could strengthen.

Almond Export Prospects Mixed

Since almond production in India is negligible and demand is high, U.S. almond growers view India as an important market. Almonds are particularly in demand during the festive season when tradition calls for exchanges of sweets and dried fruits.





U.S. almond exports to India rose to $7.5 million during 1982 but fell to $3.9 million in 1984 due to licensing and tariff restrictions. In 1984, India converted tariffs from an ad valorem basis to specific rates, which, although still high, are below the previous levels.

The duty on soft-shell almonds also was reduced, eliminating an unfair advantage for almonds imported from Afghanistan, the principal U.S. competitor in almond trade with India.

Although these actions will help restore trade, U.S. almond growers believe exports to India could double or triple if almonds were placed under a more liberal import policy.

Recent policies resulted in a 30-percent decrease in imports in the dry fruit category, seriously constraining almond imports. However, as a result of U.S. government actions, this category of imports could be liberalized somewhat in the near future. ■

The author is U.S. agricultural counselor in New Delhi, India.

Fact File

Agricultural Trade Offices: Overseas Bases for U.S. Exporters

To help U.S. agricultural exporters compete worldwide, the U.S. Department of Agricultural's Foreign Agricultural Service (FAS) operates a network of agricultural trade offices in the major markets of Europe, South America, Africa, Asia and the Middle East.

These offices supply U.S. exporters with up-to-the-minute information on potential customers and promotional opportunities. Many house overseas representatives of some of the nonprofit U.S. market development cooperators that work with FAS to develop new foreign markets.

A Home Base Abroad

U.S. exporters or representatives of trade associations, export cooperatives or state departments of agriculture can use the agricultural trade offices as a home base while overseas. Desks, telephones and secretarial support are available to U.S. exporters servicing an established market or attempting to enter a new one.

Space for small product displays can be scheduled in advance. The trade officer can also arrange product demonstrations for potential foreign buyers.

Promoting U.S. Products

Each agricultural trade office regularly hosts or participates in exhibitions promoting the sale of U.S. food and agricultural products abroad. Sometimes the shows display only U.S. products. At other times, U.S. exporters can participate in large, multinational exhibitions which draw tens of thousands of buyers.

On a somewhat smaller scale, the agricultural trade offices sponsor hotel and restaurant menu promotions and in-store promotions of retail products. They also organize seminars on U.S. commodities for foreign buyers.

Trade officers host visiting U.S. corporate sales teams and state and federal government trade missions to the countries within their marketing regions. In these activities the trade offices give special attention to high-value products such as fresh fruits and vegetables and to consumer-ready items such as breakfast cereals and other canned, packaged and frozen foods.

The agricultural trade offices also provide one-stop service to potential foreign customers. Each office displays buying guides, exhibit kits and other information useful to foreign buyers. Buyers receive *Contacts for U.S. Farm Products*, a monthly listing of U.S. exporters and their products. Many trade offices also publish a multicountry newsletter that features U.S. products, local sales success stories and trade news.

Market Reporting

Agricultural trade officers report regularly on the market situation of key commodities of interest to U.S. exporters. This includes current price levels, sources of imports, competitors' marketing strategies, packaging and labeling requirements and types and grades of items on a country's import list. New or developing market opportunities are flagged for special attention.

U.S. Agricultural Trade Offices Span the Globe

Agricultural Information and Marketing Services

Minutes after foreign buyers notify one of the agricultural trade offices of their product needs, exporters in the United States can receive that information via computer. This sophisticated communications system is part of FAS' Agricultural Information and Marketing Services (AIMS) export promotion program.

AIMS services to assist U.S. companies introduce their products to foreign markets and expand present overseas markets include:

Buyer Alert Service: FAS uses high-speed telecommunications links to forward sales announcements of U.S. products to interested overseas buyers.

Foreign Contacts: Computer-based files can match U.S. companies producing particular products with foreign firms that have identified themselves as prospective buyers of those products. U.S. businesses interested in exporting to specific countries or regions of the world can be put in touch with buyers in those areas.

Product Publicity: The monthly newsletter, *Contacts for U.S. Agricultural Products*, introduces U.S. food and agricultural products to foreign buyers.

International Marketing Profiles: Commonly known as IMPs, these profiles include detailed international trade statistics and foreign importer mailing lists. Reports are available for selected countries and commodity groups.

Trade Leads: The agricultural trade offices can communicate the specific import needs of a foreign trader to U.S. exporters of food and agricultural products. U.S. companies can receive those trade leads in three ways: daily commercial electronic dissemination, daily computerized direct mail and the weekly *Export Briefs* bulletin.

The Washington Office

For more information on U.S. agricultural trade offices, contact: Trade Office Coordinator, Room 4944-S, Export Programs Division, Foreign Agricultural Service, United States Department of Agriculture, Washington, D.C., 20250. Telephone (202) 447-3031.

Trade Office Locations

ALGERIA, Algiers
28 Rue Youcef Tayebi
El Biar, Algiers
Mailing Address:
Algiers
Department of State
Washington, D.C. 20520
Tel. (011-213) 601-425, x251
Telex: 53681 USAGR DZ

BAHRAIN, Manama
Shaikh Isa Road
P.O. Box 26431
Manama
Mailing Address:
American Embassy
FPO, New York 09526
Tel. (011-973) 742-127
Telex: 9398 USATO BN

CHINA, Beijing
Xiushui Dongjie
Beijing
Mailing Address:
Agricultural Affairs Office
American Embassy
FPO, San Francisco
96655-0001
Tel. 523-831, x274
Telex: 22701 AMEMB CN

CHINA, Guangzhou
Dong Fang Hotel
Box 100
Guangzhou
Mailing Address:
ATO, Consulate General
Dong Fang Hotel, Box 100
FPO, San Francisco 96659
Tel: 669 900 x1180
Telex: 44439 GZDFH CN

GERMANY, Hamburg
Grosse Theaterstrasse 42
D-2000 Hamburg 36
Mailing Address:
c/o AmConGen
APO, New York 09215-0002
Tel. (011-49-40) 341-207
Telex: 0216 3970 ATO D

IRAQ, Baghdad
Box 2447 Alwiyah
Baghdad
Mailing Address:
Baghdad
Department of State
Washington, D.C. 20520
Tel. (011-964-1)
719-6138/718-1840
Telex: 212287 USINT IK

KOREA, Seoul
#63 1 KA, Ulchiro
Chung-Ku Seoul 100
Mailing Address:
American Embassy
APO, San Francisco 96301
Tel. (011-82-2)
732-2601, x4188
Telex: K 25823 SOLATO

NIGERIA, Lagos
1 Kings College Road
P.O. Box 554
Lagos
Mailing Address:
Lagos
Department of State
Washington, D.C. 20520
Tel. (011-234-1)
634-864 or 633-651
Telex: 21670 USEMLA NG

SAUDI ARABIA, Jeddah
Al Zouman Commercial
Center, Suite 11
Palestine Road & Hayel Street
Mailing Address:
AmConGen
APO, New York 09697
Tel. (011-966-2)
661-2408/667-6196
Telex: 404683 USATO SJ

SINGAPORE
541 Orchard Road, 08-04
Liat Towers
Singapore 0923
Mailing Address:
American Embassy
FPO, San Francisco 96699
Tel. (011-65)
737-1233/734-1820
Telex: RS 55318 - USDA

TUNISIA, Tunis
6 Rue St. Fulgence, 1002
Tunis
Mailing Address:
Tunis
Department of State
Washington, D.C. 20520
Tel. (011-216-1) 289-383
Telex: 14307 USATO

TURKEY, Istanbul
104-108 Mesrutiyet Caddesi
Tepebasl, Istanbul
Mailing Address:
CG-Istanbul
APO, New York 09380
Tel. (011-90-1)
1436200/09, x 260
Telex: 24077 ATAT RAU

UNITED KINGDOM, London
101 Wigmore Street
London, W1H 9 AB
Mailing Address:
American Embassy
Box 40, FPO,
New York 09510
Tel. (011-44-1) 499-0024
Telex: 296009 USAGOF

VENEZUELA, Caracas
Torre C. Piso, 19, Centro Plaza
Los Palos Grandes,
Caracas 1060
Mailing Address:
American Embassy
APO, Miami 34037
Tel. (011-58-2)
283-2599/283-2353
Telex: 29119 USATO VC

Sign-Up Underway for NASDA's 1987 Exposition

The rush is on for the third biennial Food and Agriculture Exposition, according to Farrell Higbee, exposition director for the National Association of State Departments of Agriculture (NASDA).

"We're just getting cranked up," Higbee said. "Quite a number of companies representing an agricultural cross section of the country have already signed up and we're expecting a great many more over the next two months."

NASDA and the Foreign Agricultural Service (FAS) co-sponsor the show which is set for Seattle, Wash., April 29-May 1, 1987. The first exposition was held in Atlanta in 1983 and the last one in Kansas City in 1985.

Although the show is still more than a year away, preparations and interest have been running at a fast pace.

Full Slate of Exhibitors Seen

"I think we will sell it out, and wind up with 400-450 food companies exhibiting at the show," Higbee said. Up to now, he said, the emphasis had been on preparing materials for buyer recruitment through FAS' far-flung network of overseas attaches.

The spotlight is now turned on continued sign-up of U.S. exhibitors who will have the unique opportunity to attract an influx of sophisticated foreign buyers on the home turf.

"As with the first two expositions, we're expecting only high-quality buyers, so lots of sales should result," Higbee pointed out.

The idea behind the NASDA Exposition is to bring together the top-line food products in the United States and some of the leading food buyers from more than 80 countries. It's where the "Best in the U.S." meets the "Best of the Rest."

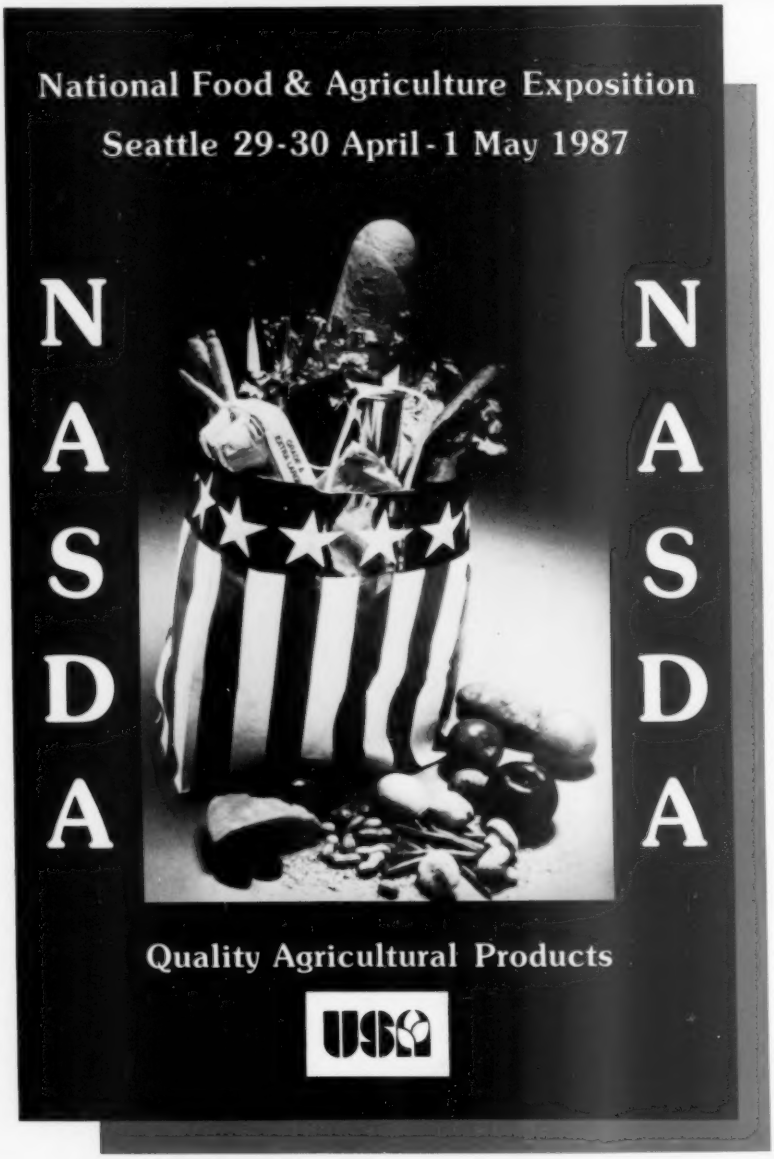
For the first time, domestic buyers will be invited to join the action on the show's final day.

Another new feature will be an education center where both sellers and buyers will be able to sharpen their tools of the trade.

"In addition to the commercial hall, we will have an education center where displays and booth space will be open to government and industry trade experts," Higbee said. "There will also be special food technology displays and an expanded seminar program for exporters and buyers," he added.

The commercial hall will open for business from 11 a.m. to 5 p.m. while the education center will be open earlier, 8:30-11:00, and later, 5:30-7:00.

For more information on the Seattle show, contact Farrell Higbee at (202) 628-8096, or write to NASDA, 1616 H Street, N.W., Washington, D.C. 20006. ■



U.S. Hides Strengthen Hold on Chinese Market

By Joel Haggard

U.S. leather sales to China totaled $63 million in 1985, making it the No. 1 market for leather exports. Less then 3 percent was finished leather. The balance, valued at over $61 million, was wet blues, just one stage above raw hides.

China also is becoming an increasingly large customer for U.S. hides. In 1985, the United States exported to China nearly 750,000 whole cattle hides valued at over $29 million, a considerable increase over the 1984 mark of 500,000 pieces valued at almost $21 million.

Citing favorable U.S. prices, Chinese officials report that U.S. hides could account for as much as 50 percent of the import market in 1986, a jump of 20 percent from last year.

The China National Native Produce and Animal By-Products Import/Export Corporation—the business entity empowered to conduct China's leather trade—claims that leather imports have remained steady over the last 30 years. Chinese officials contend that dramatic shifts in buying patterns do not indicate increased demand or consumption but merely reflect changes in where the goods are bought.

A number of U.S. competitors do not agree, reporting surges in sales similar to those of the United States. The opinion in some circles is that economic growth in China has indeed increased the overall demand for leather and hides.

It is difficult to know just how big the Chinese leather market is because there are no import statistics published for cattle hides. Late in 1984, however, an official Chinese newspaper reported that China annually imports 2 million pieces.

Future Bodes Well for Cattle Hide Imports

Perhaps the most significant trend in China's hide and leather industries is the steady increase in use of cattle hides in shoe production.

Almost all imported leather and cattle hides are processed into men's shoes. Only a small amount of imported material is processed into sports equipment, handbags and leather apparel.

China produces over 1 billion pairs of shoes annually. Roughly 20 percent of this amount is classified as leather shoes—half of these are made from cattle hides and the other half from pig skins.

According to late November 1985 statistics published in China's *Economic Daily* newspaper, retail sales of leather shoes in 1984 reached 240 million pair.

Chinese economists report that demand for leather shoes (as reflected in the level of retail sales) is growing at 8 percent a year, or roughly 16 million pairs. Government officials see continued growth in leather shoe production with output expected to reach 300 million pairs by 1990.

In 1980, leather shoes made from cattle hide accounted for only 30 percent of total production. The share increased to 50 percent over the succeeding five years. If this pace continues in the future, demand for cowhide will grow by 500,000 pieces each year.

No doubt, China will attempt to satisfy the growing need with domestic supplies, but, as trade statistics hint, the country may have to rely increasingly on outside suppliers.

Scarcity May Spur Greater Imports

Although information on the domestic hide and leather industry is scarce, it is clear there is no integrated industry for cattle because specialized cattle raising for beef production is uneconomical.

Limited beef supplies—and presumably hides—come from slaughtered draft animals. Moreover, these animals work most of their lives before being slaughtered, a factor which adversely affects the quality of hides.

In July 1984, the procurement prices of sheep, goat and cattle skins were allowed to adjust to market conditions, a policy which saw increases in hide prices. At the same time, factories producing leather goods were told they would be responsible for securing their own raw materials.

In the past, the Ministry of Commerce took charge of allocating hides to shoe manufacturers and other leather goods producers. Suddenly, factories found themselves bidding against their neighbors for what had become a scarce commodity.

An article appearing in a 1985 yearend edition of *Economic Daily* said that Inner Mongolia's cattle hide supplies were able to satisfy only 70 percent of the province's needs.

Inner Mongolia's shortage almost certainly reflects an even greater shortfall nationwide, especially since that province is a major bovine animal producer.

Procurement statistics underscore the hide shortage. In 1984 (the latest year for which statistics are available), cattle hide procurement totaled 3.5 million pieces, down 20 percent from 1983. Moreover, procurement numbers pale in comparison to the cattle population, which stands at roughly 80 million head.

Trade figures suggest that supplies of other animal hides are not as tight. Sheep and goat skin markets are brisk, but supplies have kept up with both domestic and international demand. China's 300-million swine population translates into a very large pig leather industry, the largest in the world by far.

China does not publish pigskin procurement data; however, a 1980 yearbook pegged total output at roughly 80 million pieces. In the same year, China produced 157.5 million pairs of leather shoes, 70 percent of which were pigskin. Projecting from 1980 data, the 1985 pigskin harvest is estimated at roughly 90 million skins.

Leather Industry Needs Upgrading

Little is known about the Chinese leather industry, except that it seems to be geographically scattered.

Reportedly, there were 550 factories producing finished leather in 1984. The number of shoe factories is pegged at 1,500, but that figure probably does not include small rural factories which turn out mostly pig skin shoes for the local market.

Frequent Chinese editorials complain about the backwardness of China's domestic leather processing industry. And several agreements have been made with East and West European countries to help modify China's leather factories.

It appears as if China's Ministry of Light Industry targets several of the larger leather factories for technical upgrading during every five-year plan. ■

The author is U.S. agricultural trade officer in Beijing, China.

U.K. Is Good Market For U.S. Bean Sales

By W. Lynn Abbott

When most of us think of an English breakfast, we envision a plate of eggs, toast, kippers and a broiled tomato. But there's another item on the breakfast menu in Britain—baked beans on toast. And it is the United States that supplies the United Kingdom with a majority of those beans.

In 1985, the United Kingdom imported roughly 115,000 metric tons of dried beans. The U.S. share of this total is estimated at roughly 65 percent, with Canada the second largest supplier.

The United Kingdom is one of the few countries in the world where bean consumption is increasing. U.K. bean consumption per person is roughly 15 pounds per year, triple that of the United States.

The greatest single use of beans in the United Kingdom is for canned navy beans in tomato sauce, otherwise known as baked beans. U.K. consumption of beans has been given a boost in recent years with increased emphasis on fiber as a dietary supplement.

Here's a breakdown of the types of dry beans imported into the United Kingdom and the market for each.

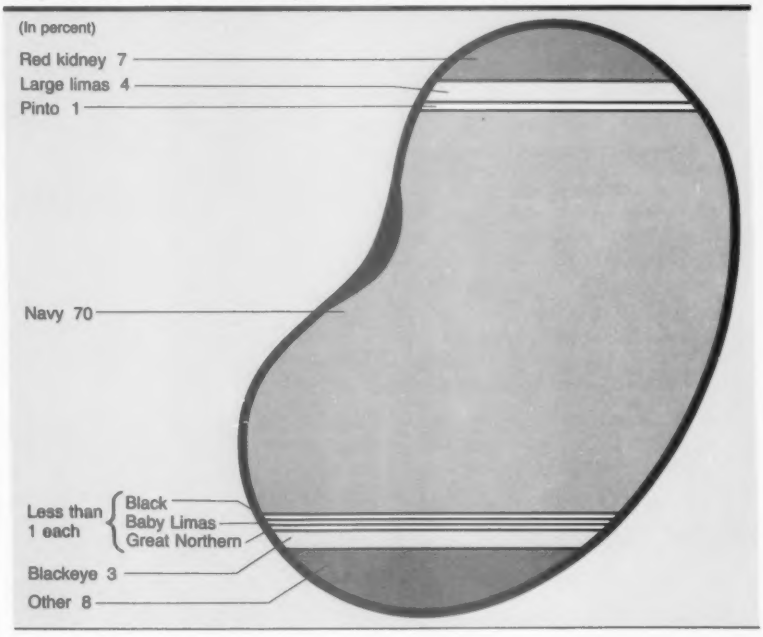
Navy beans are used almost entirely for canning (95 percent of the market). They are traded by specialized factors and are sold primarily to large canners. In the U.K. market, U.S. navy beans compete for the most part with Canadian beans.

Red kidney beans are used for both canning (two-thirds of the market) and for retail pack dried beans.

Lima beans are sold to the United Kingdom in substantial quantities primarily for canning. Baby lima beans are imported in much smaller amounts, also for canning. Madagascar also is a major supplier of lima beans to the United Kingdom.

Great Northern beans are sold almost entirely to the dry packaged trade. They often are labeled "haricot" at the retail level. Navy beans also may be sold under this same name.

Navy Beans Head U.S. Bean Exports to the U.K. In 1985



Competition for this sector of the bean market is expected to intensify now that Argentine "aluvia" beans are once again available. Shipments had been suspended after the Falklands crisis in 1982.

Cranberry beans are imported in small quantities for canning. U.K. canners prefer the bush-type cranberry bean over the vine-type, although both types are imported into Britain. The potential for this bean is considered to be quite good.

Small red beans are imported in very minor amounts for canning.

Pink beans are not imported into the United Kingdom.

U.K. Bean Production Is Limited

The United Kingdom produces a broad bean that is eaten as a kernel, but it is harvested green for freezing or the fresh trade. Minor amounts are dried for the health food sector. In 1984, U.K. bean production totaled approximately 23,000 tons, only 16 percent of total consumption.

How To Export Beans to the U.K.

Dry beans are shipped in 100-pound bags in 20-foot containers, usually in lots of 400 bags. The normal terms are cash against documents. Both the U.S. Department of Agriculture and the state of Michigan's grade standards are used in the trade.

The import duty for beans (tariff schedule item 0705.B1) is 3 percent (suspended for white dry beans). Dry beans are imported either directly by the major canners or by specialized bean traders for the major canneries or other primary users.

Beans imported for the retail dry goods trade usually are delivered to local repackers. They, in turn, package them in bags with their own label or that of their clients.

A list of U.K. importers of dried beans is available from the U.S. agricultural trade office in London. Contact: U.S. Agricultural Trade Office, Box 40, FPO New York 09510. Tel: 011-44-1-499-0024. Telex 296009 USAGOF.

Where To Find Help in the U.S.

Promotional work on behalf of U.S. dry edible beans is carried out by the following U.S. market development cooperator organizations.

Michigan Bean Industry
Box 6008
Saginaw, MI 48608
Tel. (517) 790-3010
Contact: John McGill

Northarvest Bean Growers Association
RR 3, Box 520
Frazee, MN 56544
Tel. (218) 334-6351
Contact: Tim Courneya

California Dry Bean Advisory Board
531-D North Alta Avenue
Dinuba, CA 93618
Tel. (209) 591-4866
Contact: Jim Melban ■

The author is U.S. agricultural trade officer in London.

Australia

Few Suppliers Dominate Processed Food Market

In Australia, the market for many processed foods is often dominated by a small number of suppliers. Markets where half or more of the market is dominated by a single firm are listed below.—*Dale B. Douglas, Agricultural Counselor, Canberra.*

Product	Dominant Supplier	Market Share (Percent)
Baby Foods	Heinz	71
Baked beans	Heinz	58
Canned spaghetti	Heinz	55
Block chocolate	Cadbury's	73
Biscuits	Arnott's	76
Cake mixes	White Wings	66
Packet tea	Bushells	56
Instant coffee	Nestle	57
Evaporated milk	Nestle	100
Sweetened condensed milk	Nestle	100
Yeast spreads	Vegemite	93
Rice	Ricegrowers Co-op	73
Packet soups	Rosella	66
Energy drinks	Lucozade	51

France

Grain Exports Continue Upward Climb

Exports of grain by France in 1985 were expected to top the previous record level of 25.1 million tons set in 1984. Exports to other European Community (EC) member countries represented about 55 percent of the volume and 60 percent of the value of France's exports in 1984. The EC still absorbs all of France's exportable corn and much of the exportable barley. However, other countries in the Community have become more self-sufficient in wheat, and in some cases have even become net exporters. Thus, the only expanding wheat markets are in non-EC wheat, where subsidized French wheat increasingly is competing with that of other major exporting countries.

Non-EC customers are the fastest growing segment of the market for French wheat. In 1984, exports to third countries totaled 11.2 million tons, a fourfold increase since 1977, or an average increase of 22 percent a year. In the same period, the growth in exports to EC member countries averaged only 6.7 percent.

The Soviet Union has become the largest buyer of French grain, purchasing 4.5 million tons in 1984. About 94 percent was wheat. French grain sales to the USSR have benefited from a three-year French-Russian supply agreement which ended in 1985. The agreement provided for up to 1 million tons of French wheat to be considered annually for purchase by the Soviet government. Actual grain sales in 1984/85 totaled 6.8 million tons. Egypt, Poland, Morocco and more recently China and Algeria have been other large markets for French grain.

French grain sales to third countries are assisted by EC export refunds (subsidies) and French government export credit and other assistance. In 1984, EC export subsidies for French grains amounted to $306 million. While this was down significantly from the preceding few years, due in large part to the sharp appreciation of the U.S. dollar, it still represented an average $27 for each ton of French grain exported to non-EC countries, or 19 percent of the value of exports.—*James Lopes, Economic Research Service. Tel. (202) 786-1716.*

Japan

Cattle Imports Expected To Rebound

The recent recovery in Japan's Wagyu calf market and the stronger yen-weaker dollar exchange relationship are likely to encourage an increase in cattle imports after three years of stagnancy.

During 1983-85—when the domestic market price for beef-breed Wagyu calves was below Japan's price support—the government reportedly discouraged the duty-free quota allottees from using their allocations. However, under the new market circumstances, 1,050 head of feeder cattle weighing less than 300 kilograms already have been imported under duty-free quota from Australia.

Japan has a tariff quota on feeder cattle. The duty-free quota has been fixed at 10,000 head per year over the past 10 years. This quota is allocated to four producer cooperatives, and is restricted to purebred Angus and Hereford steers which are under 300 kilograms, landed weight. Any feeders imported outside of the quota are subject to a high tariff of 45,000 yen a head for landed weight of less than 300 kilograms, or 75,000 yen per head for landed weight of more than 300 kilograms.

In addition to feeder cattle, it is expected that the stronger yen may encourage the import of substantial quantities of fat cattle and horses for slaughter.*Bryant Wadsworth, Agricultural Counselor, Tokyo.*

Singapore

Hi-Tech Farming Envisioned for Future

By the 1990s, government plans call for grouping Singapore's farmers into high technology research and development parks, with the land leased to local farmers and investors and to multinational agro-based companies. The land would be used for horticulture, fish and aquarium farming and other non-pollutive farming such as poultry and bird breeding, crocodile breeding, dairy cattle farming and frog farming.

At present, Singapore's production of food varies from 16 percent of the vegetables consumed to 50 percent of the poultry.

These agro-technology farms will serve as production as well as demonstration centers. Thus, Singapore would be able to help other countries in the region to learn hi-tech farming methods.

The government is interested in acquiring foreign technology, but private individuals from Singapore also may be sent abroad to learn high technology farming.—*Peter O. Kurz, Agricultural Trade Officer, Singapore.*

United Kingdom

Farm Income Falls Dramatically

Net farm income in the United Kingdom during 1985 was down by 43 percent from 1984 in money terms. However, it should be kept in mind that net farm income in 1984 was up 35 percent from 1983. In real terms, the index of net farm income (1980 equals 100) was 78 compared with 146 in 1984 and 113 in 1983.

The main reason for last year's income slump was the cold wet weather which had adverse effects on almost all types of agriculture. Grain growers, even in the intensive arable area of eastern England, suffered from reduced yields and poor quality. In the upland areas of western and northern England, Wales, Scotland and Northern Ireland, livestock, haymaking and feed crops suffered from the bad weather.

Almost all sectors suffered substantial income declines. Lowland cattle and sheep fared particularly badly with the 1985/86 (1982/83 = 100) index down to only 25 compared with 58 the previous year. The figure for cattle and sheep in hill and other less favored areas was 50, compared with 96 in 1984/85. The results for dairying, while not good, showed a much more moderate fall with the 1985/86 figure at 50 compared with 59 in 1984/85. The index for cereals in 1985/86 was 45 compared with 118 the previous year.—*Turner L. Oyloe, Agricultural Counselor, London.*

U.S. Plays Major Role In Japanese Holstein Genetics

By James A. Dickrell

Japanese Holstein breeders have been using U.S. Holstein genetics for nearly 100 years. In fact, a leading Japanese livestock executive says, "American blood is always running in the history of our dairy farms."

Dairy farming in Hokkaido, the center of the Japanese dairy industry, has been greatly influenced by U.S. dairy farming, according Tamotsu Hirao, executive managing director of the Hokkaido Livestock Improvement Association, Inc. (HLIA), in Sapporo, Japan.

"It is not a coincidence that the friendship between the Holstein Association of America and our association is very close," Hirao says.

Long History of Dairy Improvement

Japan imported the first Holsteins in 1889. By 1910, Holsteins made up 70 percent of the Japanese dairy herd, outnumbering the native cattle breed, Wagyu, which had been the predominant one used for dairy since 600 or 700 A.D.

The first U.S. cattle semen—twelve units of fresh semen from Curtiss Candy Piece, a prize U.S. Holstein bull— was exported to Japan in 1950. That first shipment created a great deal of interest within the Japanese dairy industry, Hirao says.

HLIA Active in Holstein Breeding

The Hokkaido Livestock Improvement Association, Inc., established in 1972, currently has five main bull centers. The association markets about 1 million units of semen annually and employs 800 artificial insemination technicians at 200 substations.

One of the association's main goals is to procure outstanding sires. To do that, HLIA relies on bulls from the United States.

The association placed its first order with the assistance of Holstein-Friesian Services, Inc., a division of Holstein-Friesian Association of America, in 1979. U.S. bulls now account for 57.5 percent of the bull population.

Hirao says the Holstein-Friesian Services has played a significant role in the areas of computer research, bull purchases and planned matings for candidate bulls.

Breeding Success Breeds Motivation

Even though HLIA has been successful thus far, it intends to continue aggressive pursuit of dairy cattle improvement through the use of artificial insemination, Hirao says. Since the association began its own progeny test program in 1975, milk production increased 2,200 pounds to 14,940 pounds per cow in 1983.

The use of electronics and biotechnology, the improvement of feed crops, and breeding and management by computer are areas where the Japanese are looking for increased efficiency.

"The tie between the Holstein Association of America and Hokkaido Livestock Improvement Association will become closer and stronger in the future," Hirao says. ■

The author is an associate editor of Holstein World. Tel. (612) 636-2117. This article is adapted from a story in the Aug. 10, 1985, issue.

Pacific Rim Is Prime Growth Area For Agricultural Imports

By Robert Tetro

The countries of the Pacific Rim[1] have emerged as one of the world's largest and fastest growing trade blocs in the past decade, according to a new study on the Pacific Rim issued by the Foreign Agricultural Service.

These countries import roughly $42-44 billion in agricultural commodities, almost one-fifth of world agricultural trade.

While the region is diverse in both culture and economic factors, the Pacific Rim as a whole has shown robust economic performance compared with other regions.

[1]Australia, China, Hong Kong, Indonesia, Japan, South Korea, Malaysia, New Zealand, the Philippines, Singapore, Taiwan and Thailand.

According to the report, *Emerging Agricultural Markets in the Pacific Rim,* these prospects are expected to contribute to a growing demand for agricultural imports in the region. This is in sharp contrast to policy and economic factors that currently limit the potential for U.S. farm exports to the European Community, which over the past decade has been replaced by the Pacific Rim as the single most important market for U.S. agricultural exports.

The high-value/value-added focus of the study reflects the following findings.

—Over the past 10-15 years, growth in the world's high-value/value-added agricultural trade has surpassed world trade in bulk agricultural products.

—Trade in high-value/value-added products is expected to continue to be the world's leading growth sector.

—On balance, trade in high-value/value-added products has held a stable market position in contrast to bulk commodity exports which have experienced sharp swings in both value and volume.

—More countries import and export high-value/value-added commodities than bulk products. The range of products traded in this sector also is greater.

The recently released study assesses agricultural trade opportunities for a wide variety of products and includes both narrative analysis as well as commodity trade statistics covering 126 agricultural products imported by the Pacific Rim group.

In addition, the study includes complete coverage of the many export services and contacts available from the Foreign Agricultural Service. It provides the types of information available from the agency's trade and production computer systems as well as those for supply and demand.

Targeted at the entire export trading community (buyers, sellers, brokers, shippers, trade organizations, consulting firms and international banks), the study is available as a complete package, including a full set of statistics available on micro-computer diskettes.

For more information on the Pacific Rim study, contact:

Agricultural Information and Marketing Services
Foreign Agricultural Service
Room 4649-S
U.S. Department of Agriculture
Washington, D.C. 20250
Tel. (202) 447-7103 ■

The author is with the Trade and Economic Information Division, FAS. Tel. (202) 382-1295.

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